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Arizona Labor Market NEWSLETTER

Arizona Department of Economic Security

Vol. VIII No. 1
January 1984

Unemployment Rate

Seasonally Adjusted
November*

ARIZONA	7.2%
Maricopa Co.	5.7%
Pima Co.	6.9%
UNITED STATES	8.4%

Consumer Price Index

National-October
1967 - Base Year

Wage Earner/Clerical Worker -	301.3
% Chg. Yr. Ago	2.6
All Urban -	302.6
% Chg. Yr. Ago	2.9

Phoenix-3rd Qtr.
1977 - Base Year

All Urban -	173.2
% Chg. Yr. Ago	1.5

Producer Price Index

National-November*
1967 - Base Year

All Commodities-	305.6
% Chg. Yr. Ago	1.8
Finished Goods -	286.8
% Chg. Yr. Ago	.7

* Preliminary

PERSPECTIVES ON HIGH TECHNOLOGY

High technology has become today's "hot topic." Everyone seems to agree that it is a key factor in Arizona's economic future. But many questions remain: What, in fact, is high tech? What are its effects on Arizona's economy and labor market? And how should education respond?

To explore some possible answers to these questions, a panel was organized at the fall conference of the Arizona Career Information System and the Arizona Business-Industry-Education Council. Participating on the panel were Dr. Lee McPheters, Professor of Economics at Arizona State University; G. M. "Solly" Sollenberger of Sechler-Sollenberger Realty Investment Company; and Dr. Patrick Henderson, recently retired Superintendent of the Phoenix Union High School District. The panel was moderated by Bertha Landrum, Director of Occupational Education for Maricopa Community College District.

The title of the panel was "Perspectives on High Technology: Its Role in Arizona's Economy and Educational System." The remarks of the three panelists are excerpted below:

Dr. Lee McPheters (Arizona State University): "Over the past thirty years, there has been a transition in the Arizona economy from a natural resource-based economy to one structured more towards manufacturing. It used to be said that the 'Four C's' of the

Arizona economy were cotton, copper, cattle and citrus; now, it may be said, the "C's" are climate (tourism), construction, computers and chips (silicon).

"These changes in the Arizona economy become apparent by contrasting the sources of income in 1950 and 1980. In 1950, agriculture and trade were the two dominant industries, accounting for 18.7 percent and 19.5 percent respectively of Arizona's income. By 1980, agriculture had dropped to 3.4 percent and manufacturing's share of income had risen from 7.0 percent to 18.1 percent, with services also accounting for 18.1 percent and government 18.4 percent. Trade, the leader in 1950, had declined several points to 16.7 percent. These changes in the state's economy have brought Arizona more in line with the national economy in which the dominant sectors are manufacturing (25.9 percent) and services (17.7 percent).

"I anticipate that the processes seen in force from 1950 to 1980 will continue, with future growth to occur in construction (assuming a continued population influx) and manufacturing. Within manufacturing, the industries which will grow the fastest are what I define as "high tech"-computers and equipment, electronics and components, scientific instruments, and aviation and aerospace. These are the industries which led all others in Arizona in terms of growth in income generated for the years 1976 to 1982. They were followed by medical and health services, heavy construction, printing and publishing, chemicals and plastics, and business services. Notice that these are the fastest growing sectors of the Arizona economy in terms of income generated and not necessarily in terms of employment.

"When one considers employment, high technology industry presently accounts for approximately 6 percent of the Arizona labor force. This includes not only engineers but a wide variety of other workers such as managers, assemblers, technicians and office workers (the present ratio of engineers to all other high tech workers in Arizona is about 1 to 12). While 6 percent of the labor force may seem relatively low, it should be pointed out that high tech manufacturing is much more important in Arizona than in the national economy. For example, in 1980, high tech products as a proportion of the value of all manufacturing shipments was 5 percent for the U. S. and 32 percent for Maricopa County. So if someone works in manufacturing in Maricopa County, the chances are 1 out of 3 they work in high tech manufacturing; nationally, the chances are only 1 out of 20.

"Despite the relatively small employment figure, high tech industry is being courted so vigorously because of its very substantial economic impact. For example, an "average" high tech firm with 400 employees will produce a conservatively estimated economic impact (direct and indirect) of $37.5 million per year. In Maricopa County alone, the direct economic impact of high tech manufacturing (including payroll, purchases, construction, property taxes and fees, and contributions) was nearly $1.6 billion in 1980 and should reach $3 billion in the next four or five years. This will surpass the economic impact of agriculture and copper.

"While I think high tech manufacturing will continue to grow in Arizona, I do not believe its growth is automatic. My own view is that the best we can hope for in the next 10 years is a doubling in high tech employment. To make Arizona attractive to high tech industry will take a lot of work by government, business and education. But when you bring high tech in, you bring in high income industry with employment opportunities not only for engineers, but for persons with a wide range of training and education."

G. M. Sollenberger (Sechler-Sollenberger Realty Investment Co.): "I'd like to begin by talking briefly about the evolution of the Arizona economy. At the turn of the century, the primary industry was mining. Later, with the development of the Salt River Project, agriculture became significant. Then, after World War II, the services industry, particularly tourism, rose to importance. Also, since World War II, manufacturing became established in Arizona and it was triggered into real action when Motorola moved here in the mid-1950s and established what we know of today as our high tech industry.

"As Lee McPheters pointed out, a couple of the industries that were the creators of wealth and the importers of capital are dying industries - mining because of world competition and the automation of various processes involved and agriculture chiefly because of the restraints on the use of water. Since jobs result from the creation of wealth or the importation of capital, it is terribly important to replace mining and agriculture. The only other industry we have that really imports capital (but does not create wealth) is tourism. So the place where I believe we have the greatest potential for creating wealth and importing capital is the high tech industry.

"Now why is it that every state in the union wants the same thing we do? Because high tech industry is where the future is and it has a great number of desirable qualities. This potential is very great for Arizona. Our manufacturing growth in the last 10 years has been about 50 percent whereas the national average is about 4 percent. The reasons for our growth are two-fold: (1) we started from a very low base; and (2) our manufacturing growth has been tied up primarily in the expanding and advancing technologies industries (a term I prefer to "high tech").

"In order to continue this growth, we need to realize that the day of pinning our hopes on relocating firms has passed. The growth of jobs now will be principally from within, from the people, companies and businesses that are already in Arizona. To encourage that to happen, certain elements need to be present. I've ranked ourselves on some of these elements on a scale of 1 to 10. On our general business climate, I'd give us a 7. Quality of life (including cost of living, cultural and recreational activities, and transportation) is also important and I'd give us a rating of about 6. Arizona has a strong system of education; I'd give us an 8. And the last element I'll mention is where we're the lowest - the availability of venture capital. I'd give us a 1.

"If high tech manufacturing is going to continue to grow within Arizona, we need to improve these ratings and, finally, we need to encourage the spirit of entrepreneurism. Venture capital is one solution. But the Engineering Excellence Program and the Research Park at ASU will also contribute substantially by encouraging research and development activity leading to the establishment of new business and new companies headquartered here in Arizona. R & D means permanence - a company's roots are generally where its R & D function is located. Plants devoted exclusively to manufacturing are vulnerable to employment fluctuations due to outside and unforeseen influences."

Dr. Patrick Henderson (Phoenix Union High School District): "Public education is currently receiving more attention than it has since the 1920s. All this attention is encouraging and I am optimistic about the future. Meanwhile, education is taking its lumps. No less than ten commissioned task forces or study groups are telling us that public education must be strengthened. All the reports recommend more academic subjects - but with fewer electives - and all recommend a minimum of one unit in computer science at the high school level.

"I have no argument with the recommendations I have seen. My concern is that like so many other well-intentioned creations, we are being inundated about the necessity of getting all students involved in computers. Even our president is furthering the notion that the nation's ills will be cured by our new sweetheart industry as it spawns massive numbers of new jobs requiring sophisticated mathematical and engineering training while reducing, or even eliminating, opportunity for the unskilled.

"The evidence suggests it is not going to work that way. High tech is neither the place where most new jobs will be found nor will high tech require a vast upgrading of the skills of the American labor force. To the contrary, the expansion of the lowest skill jobs in the American economy will vastly outstrip the growth of high technology ones. And the proliferation of high technology industries and their products is far more likely to reduce the skill requirements for jobs in the U. S. economy than upgrade them.

"Last year the Labor Department projected that during the balance of the 1980s, jobs for computer programmers are expected to be about 150,000. Some 1.3 million new jobs

are projected for janitors, nurse's aides and orderlies. That is nine semi or unskilled jobs in these categories alone for every computer programmer. In fact, no high tech job ever makes the Labor Department's Top Twenty in terms of total numbers of jobs added to the U. S. economy.

"New jobs for data-processing-machine mechanics will increase 148 percent, making it the fastest growing job category. But that large gain translates into an increase of less than 100,000 new jobs, while 800,000 new jobs are projected for fast food workers and kitchen helpers alone.

"Of course, occasional shortages of skilled workers will arise in particular occupations and industries as they have occurred historically. Both the economy and education system will have to make specific adjustments to alleviate them. But that is hardly the general shortage of skilled workers projected by those who have expressed concern about the effects of high tech.

"In fact, the most sophisticated equipment often means the worker requires less sophisticated skills. Workers will need to learn different skills rather than more demanding ones. For example, the new generation of office computers is specifically designed so that "No special computer skills are needed." The latest word processors can even correct typing and strong spelling skills are no longer required.

"In a recent publication of the Washington Post, writers Henry Levin and Russell Rumburger were quoted as saying, 'If the future of work is being written in Silicon Valley, the danger signs are already evident. Although there are clearly some high level executives, programmers, and engineers who are stiumulated by their jobs in the Valley, most workers in these industries are clerical employees, assembly workers, and low-level technicians, the challenge of whose labor may leave something to be desired.'

"I am not opposed to teaching students more math, science, and computer literacy. But we must recognize that only high level achievers in math and science will succeed in the high level management and engineering jobs that are being promoted by those committed to high tech as a way of life.

"We need to take a clear look at the job implications for high tech, rather than blindly accepting the folk wisdom on the subject. It must be understood that I believe most jobs in the future will exist because of high tech. So no one should conclude from my remarks that high tech will not play an increasingly important role in our lives.

"But is it possible that as we rush head-on into increasing standards and requirements for graduation, there may just be some other ingredients that are essential to a good education and to developing the well-adjusted productive human being? And might we be better off in education if we used the financial and manpower resources to do a better job of teaching students so that they will become more proficient in the basic skills, rather that tie those resources up in large quantities of technological hardware? I raise these questions as a word of caution and out of a concern for what is happening in public education in terms of resources.

"A front page story in the San Jose Mercury estimated that 'A third of all workers in the (Silicon) Valley are involved in drugs and alcohol and that drugs are largely responsible for thefts on the job, accidents and decreases in productivity and quality.' The simple explanation is that most of the jobs are routine, monotonous, and boring with little or no opportunity for upward mobility. There is a lot of work that can fit into that description, but high tech is the glamour industry, and students are being led to believe that all they have to do in order to get into such a glamour industry is to stay in school. You and I know they have to do a great deal more than stay in school and that is why I think we need to use some discretion in how we counsel students in terms of electronics and high technology. They need to understand that for everyone who succeeds in high tech, there will likely be nine others who will be doing something else. And of those working in high tech, most will be working in jobs with limited upward mobility. Some one must do those jobs, but it means that high schools will need to be somewhat cautious in training students and more selective in the programs for which students are being trained."

COMMUTING IN ARIZONA

Hugh Downes is probably Arizona's most famous commuter. He lives in Carefree, but works in New York City. That's some commute, even by airplane. Nevertheless, there are many in Arizona who commute to another county to work. The table of "Place of Work Destinations" for Arizona county residents from the 1980 census shows the magnitude of commuting that goes on between Arizona's counties, and from Arizona counties to counties of other states.

For instance, did you know that there are workers in the Phoenix area who live in every other county of the state? You may have suspected it when you were on the freeway on Monday morning heading for downtown Phoenix, but did you really think some commuters were from every other county?

There are other places of work that might seem unlikely for any Arizona county resident. For instance, would you have expected commuting between these locations?

Mohave County to Las Vegas, Nevada
Mohave County to San Bernadino, CA
Navajo County to Mesa
Yavapai County to Tucson
Yuma County to Riverside County, CA
Yuma County to San Diego SMSA, CA

Those are some of the longer commutes, but there are many that cross over multiple counties, despite the size of those counties and the distances to be traveled. When you consider that the U. S. Labor Department's definition of a labor market has a central concept requiring being able to change jobs without changing residence, you can see why that kind of definition sometimes breaks down in application. Arizonans are mobile people.

Note: Due to processing errors, those individuals working in Lake Havasu City were counted in Remainder of Mohave County.

PLACE OF WORK DESTINATION

APACHE COUNTY	
TOTAL LIVING IN	13255
WORKING IN:	
Apache County	10288
Navajo County	445
Greenlee County	10
Carron County, N. Mex.	4
Gallup, city of, N. Mex.	205
Remainder of McKinley County, N. Mex.	174
Farmington, city of, N. Mex.	27
Remainder of San Juan County, N. Mex.	182
Montezuma County, Colo.	6
San Juan County, Utah	7
Gila County	39
Phoenix, city of	46
Remainder of Phoenix, AZ SMSA	43
Coconino County	31
Worked elsewhere	166
Place of work not reported	1642
COCHISE COUNTY	
TOTAL LIVING IN	33014
WORKING IN:	
Tucson, city of	364
Remainder of Tucson, AZ SMSA	210
Sierra Vista, city of	6577
Bisbee, city of	1811
Douglas, city of	3984
Remainder of Cochise County	17033
Hildago County, N. Mex.	11
Mexico	40
Pima County	18
Gila County	28
Nogales, city of	6
Remainder of, Santa Cruz County	28
Graham County	32
Phoenix, city of	67
Remainder of Phoenix, AZ SMSA	44
Worked elsewhere	356
Place of work not reported	2355
COCONINO COUNTY	
TOTAL LIVING IN	29573
WORKING IN:	
Flagstaff, city of	16128
Remainder of Coconino County	9907
Navajo County	468
Gila County	14
Yavapai County	194
Mohave County	26
Kane County, Utah	43
Phoenix, city of	194
Scottsdale, city of	15
Tempe, city of	22
Mesa, city of	12
Remainder of Phoenix, AZ SMSA	341
Remainder of Las Vegas, Nev. SMSA	3
Apache County	41
Worked elsewhere	160
Place of work not reported	2005
GILA COUNTY	
TOTAL LIVING IN	11731
WORKING IN:	
Phoenix, city of	112
Scottsdale, city of	15
Remainder of Phoenix, AZ SMSA	33
Gila County	9238
Pinal County	165
Navajo County	420
Remainder of Coconino County	56
Apache County	19
Greenlee County	59
Remainder of Tucson, AZ SMSA	11
Worked elsewhere	39
Place of work not reported	1564

GRAHAM COUNTY

TOTAL LIVING IN	7393
WORKING IN:	
Tucson, city of	5
Remainder of Phoenix, AZ SMSA	6
Graham County	6085
Remainder of Cochise County	41
Gila County	166
Pinal County	14
Santa Cruz County	4
Greenlee County	579
Worked elsewhere	22
Place of work not reported	471

GREENLEE COUNTY

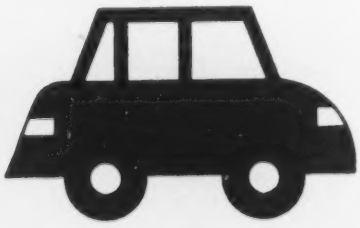
TOTAL LIVING IN	4032
WORKING IN:	
Greenlee County	3867
Graham County	5
Hidalgo County, N. Mex.	5
Navajo County	48
Gila County	20
Place of work not reported	117

MARICOPA COUNTY

TOTAL LIVING IN	658854
WORKING IN:	
Phoenix, central business dist.	55695
Phoenix, remainder of	302060
Glendale, city of	20611
Scottsdale, city of	41307
Tempe, city of	50133
Mesa, city of	43550
Chandler, city of	7300
Remainder of Maricopa County	65105
Tucson, city of	373
Remainder of Tucson, AZ SMSA	213
Casa Grande, city of	174
Remainder of Pinal County	2226
Yuma, city of	87
Remainder of Yuma County	109
Yavapai County	267
Gila County	316
Flagstaff, city of	164
Remainder of Coconino County	79
Mohave County	110
Mexico	36
Worked elsewhere	4233
Place of work not reported	64706

MOHAVE COUNTY

TOTAL LIVING IN	20688
WORKING IN:	
Remainder of Mohave County	16280
Las Vegas, city of, Nev.	37
Remainder of Las Vegas, Nev. SMSA	1290
Washington County, Utah	16
Kane County, Utah	26
Remainder of Coconino County	38
Yavapai County	64



Remainder of Yuma County	70
San Bernadino, city of, CA	16
Remainder of San Bernadino County, CA	278
Riverside County, CA	12
Mesa, city of	21
Remainder of Phoenix, AZ SMSA	13
Worked elsewhere	279
Place of work not reported	2248

NAVAJO COUNTY

TOTAL LIVING IN	20647
WORKING IN:	
Navajo County	17014
Apache County	623
Graham County	15
Gila County	95
Flagstaff, city of	13
Remainder of Coconino County	235
San Juan County, Utah	8
Phoenix, city of	65
Scottsdale, city of	12
Mesa, city of	44
Remainder of Phoenix, AZ SMSA	16
Yavapai County	15
McKinLey County, N. Mex.	33
Worked elsewhere	260
Place of work not reported	2199

PIMA COUNTY

TOTAL LIVING IN	220820
WORKING IN:	
Tucson, central business district	9981
Remainder of Tucson, city of	145334
South Tucson, city of	1339
Remainder of Pima County	43698
Phoenix, city of	379
Glendale, city of	15
Tempe, city of	50
Mesa, city of	19
Remainder of Phoenix, AZ SMSA	191
Casa Grande, city of	39
Remainder of Pinal County	2632
Sierra Vista, city of	116
Remainder of Cochise County	385
Nogales, city of	184
Remainder of Santa Cruz County	120
Graham County	37
Mexico	105
Yuma County	50
Worked elsewhere	1789
Place of work not reported	14357

PINAL COUNTY

TOTAL LIVING IN	30792
WORKING IN:	
Phoenix, city of	642
Scottsdale, city of	170
Tempe, city of	317
Mesa, city of	1200
Remainder of Phoenix, AZ SMSA	847
Tucson, city of	60
Remainder of Tucson, AZ SMSA	126
Casa Grande, city of	5333
Remainder of Pinal County	17010
Remainder of Cochise County	11
Navajo County	21
Gila County	1529
Yavapai County	13
Coconino County	14
Yuma County	11
Worked elsewhere	47
Place of work not reported	3441

SANTA CRUZ COUNTY

TOTAL LIVING IN	7632
WORKING IN:	
Tucson, city of	65
Remainder of Tucson, AZ SMSA	202
Nogales, city of	4737
Remainder of Santa Cruz County	1391
Sierra Vista, city of	11
Remainder of Cochise County	80
Pinal County	11
Phoenix, city of	15
Mexico	133
Worked elsewhere	89
Place of work not reported	898

YAVAPAI COUNTY

TOTAL LIVING IN	22350
WORKING IN:	
Phoenix, city of	265
Tempe, city of	11
Mesa, city of	20
Remainder of Phoenix, AZ SMSA	137
Prescott, city of	8465
Remainder of Yavapai County	8141
Flagstaff, city of	82
Remainder of Coconino County	617
Mohave County	7
Yuma, city of	22
Remainder of Yuma County	23
Remainder of Tucson, AZ SMSA	27
Pinal County	12
Worked elsewhere	285
Place of work not reported	4236

YUMA COUNTY

TOTAL LIVING IN	33131
WORKING IN:	
Yuma, city of	13834
Remainder of Yuma County	14119
Yavapai County	36
Phoenix, city of	93
Tempe, city of	11
Glendale, city of	16
Tucson, city of	17
Remainder of Tucson, AZ SMSA	34
Mexico	34
El Centro, city of, CA	13
Remainder of Imperial County, CA	282
Riverside County, CA	296
San Bernadino County, CA	15
Remainder of San Diego, CA SMSA	42
Worked elsewhere	307
Place of work not reported	3982

ARIZONA UNEMPLOYMENT INSURANCE ACTIVITIES - OCTOBER

	October 1983	September 1983	October 1982	% Change From One Year Ago
Arizona Claimants Served**	35,749	37,642	73,480	-51.3%
Arizona Average Weeks Unemployed***	9.3	9.8	10.2	- 8.8%
Arizona Benefits Paid**	$ 10,249,204	$ 12,068,404	$ 23,474,395	-56.3%
Arizona Trust Fund Balance	$168,505,487	$169,625,213	$229,631,841	-26.6%

*Estimated **All Programs ***UI Only

ARIZONA RECEIVES FINAL JTPA ALLOCATION

Governor Bruce Babbitt was notified by the U. S. Department of Labor on November 17, 1983 of Arizona's final Job Training Partnership Act allocation. Arizona will receive $16,406,848 of JTPA Title II-A funds over the next nine months. Distribution of JTPA funds is based on allocation percentages contained in the Act. The state JTPA administration will receive 5 percent of the funds or $820,342. Six percent of the funds, or $984,410, will be set aside for technical assistance and incentive grants to the Service Delivery Areas. Eight percent of the funds, or $1,312,548, will be used by vocational education to establish vocational programs in the Service Delivery Areas. Three percent of the funds, or $492,205, will be used by the Service Delivery Areas to establish training programs for older workers. The remaining 78% of the funds, or $12,797,341, will be distributed to the Service Delivery Areas to establish their training programs.

Funds are distributed to the Service Delivery Areas according to a formula contained in the Act. The formula consists of three equal elements: 1) the number of people in an "area of substantial unemployment" (ASU); 2) the number of people who are excess unemployed over 4.5 percent; and 3) the number of people in poverty. The table below details the allocations to Arizona's eleven Service Delivery Areas.

Jeffrey D. Bowman

	ASU*	OVER 4.5%	POVERTY	TOTAL
Phoenix	$1,183,058	$ 937,830	$1,096,358	$ 3,217,247
Maricopa	865,187	596,640	857,636	2,319,464
Pima	735,687	696,099	728,477	2,160,264
Sixco	444,212	539,150	343,730	1,327,092
Yuma	179,550	248,074	139,339	566,965
Santa Cruz	54,457	78,237	44,573	177,268
Gila-Pinal	222,072	291,235	195,359	708,667
Greenlee	64,915	110,653	12,391	187,959
Cochise	115,175	134,063	131,478	380,717
Graham	45,205	64,037	35,461	144,674
All Reservation	356,257	569,757	681,003	1,607,018
Arizona Total	$4,265,780	$4,265,780	$4,265,780	$12,797,341

(All estimates are rounded to nearest dollar)

*A contiguous area with a current population of at least 10,000 and a 12-month average unemployment rate of at least 6.5 percent for the reference period (May 1982 to April 1983 for FY 1984). Arizona's unemployment rate during the reference period was 10.8 percent, qualifying the entire state as an area of substantial unemployment for JTPA allocations in the current fiscal year.

Arizona Labor Force and Employment

November 1983 (in thousands)

	ARIZONA				
	Nov.* 1983	Oct. 1983	Nov. 1982	-- Amt Change -- Oct. to Nov.	1982 to 1983
TOTAL CIVILIAN LABOR FORCE	1393.1	1372.9	1350.1	+20.2	+43.0
Total Unemployment	98.8	104.9	143.8	-6.1	-45.0
Rate	7.1	7.6	10.7	---	---
Rate (Sea. Adj.)**	7.2	7.8	10.9	---	---
Total Employment	1294.3	1268.0	1206.3	+26.3	+88.0

THE ABOVE LABOR FORCE STATISTICS SHOULD

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY PLACE OF WORK

TOTAL WAGE AND SALARY	1076.9	1067.6	1039.5	+9.3	+37.4
Manufacturing	156.9	156.4	148.9	+0.5	+8.0
Durable Goods	122.2	121.3	114.5	+0.9	+7.7
Stone, Clay and Glass	5.9	5.8	4.9	+0.1	+1.0
Primary and Fabricated Metals	13.7	13.8	14.5	-0.1	-0.8
Primary Metals	6.0	6.3	6.7	-0.3	-0.7
Fabricated Metals	7.7	7.5	7.8	+0.2	-0.1
Machinery	62.3	61.8	59.5	+0.5	+2.8
Other Durable Goods	40.3	39.9	35.6	+0.4	+4.7
Aircraft and Missiles	18.3	18.2	16.6	+0.1	+1.7
Lumber and Wood Products (Except Furniture)	6.2	6.2	4.8	+0.0	+1.4
All Other Durable Goods	15.8	15.5	14.2	+0.3	+1.6
Nondurable Goods	34.7	35.1	34.4	-0.4	+0.3
Food and Kindred Products	7.9	8.6	8.8	-0.7	-0.9
Apparel	5.1	5.0	5.0	+0.1	+0.1
Printing and Publishing	12.3	12.1	11.7	+0.2	+0.6
All Other Nondurable Goods	9.4	9.4	8.9	+0.0	+0.5
Mining and Quarrying	15.6	15.6	16.0	+0.0	-0.4
Copper Mining	12.6	12.6	13.0	+0.0	-0.4
Other Mining and Quarrying	3.0	3.0	3.0	+0.0	+0.0
Construction	76.3	76.4	64.7	-0.1	+11.6
Trans., Communications, and Public Utilities	56.3	55.9	56.4	+0.4	-0.1
Transportation	23.7	23.5	23.6	+0.2	+0.1
Communications and Public Utilities	32.6	32.4	32.8	+0.2	-0.2
Trade	262.5	257.7	258.5	+4.8	+4.0
Wholesale Trade	52.4	51.8	51.2	+0.6	+1.2
Retail Trade	210.1	205.9	207.3	+4.2	+2.8
General Merchandise and Apparel	39.0	37.1	39.7	+1.9	-0.7
Food Stores	33.2	32.8	33.2	+0.4	+0.0
Automotive and Service Stations	24.2	24.3	24.3	-0.1	-0.1
Eating and Drinking Places	71.5	70.5	69.2	+1.0	+2.3
Other Retail Trade	42.2	41.2	40.9	+1.0	+1.3
Finance, Insurance, and Real Estate	63.4	63.0	61.8	+0.4	+1.6
Services and Miscellaneous	232.0	229.3	222.7	+2.7	+9.3
Hotels and Other Lodging Places	24.0	23.4	23.2	+0.6	+0.8
Business Services	43.8	43.3	41.0	+0.5	+2.8
Health Services	63.2	62.7	61.3	+0.5	+1.9
Other Services	101.0	99.9	97.2	+1.1	+3.8
Government	213.9	213.3	210.5	+0.6	+3.4
Federal	39.0	38.9	38.1	+0.1	+0.9
State and Local	174.9	174.4	172.4	+0.5	+2.5
School	109.5	108.6	106.6	+0.9	+2.9

* Preliminary
** Normal seasonal variations have been eliminated to reflect underlying economic trends.
NOTE--Data has been adjusted to the 1972 Standard Industrial Classifications (SIC).

November 1983 (in thousands)

MARICOPA COUNTY					PIMA COUNTY				
			-- Amt Change --					-- Amt Change --	
Nov.* 1983	Oct. 1983	Nov. 1982	Oct. to Nov.	1982 to 1983	Nov.* 1983	Oct. 1983	Nov. 1982	Oct. to Nov.	1982 to 1983
860.1	843.9	824.0	+16.2	+36.1	260.7	256.5	251.9	+4.2	+8.8
48.3	51.0	71.2	-2.7	-22.9	18.0	19.0	26.9	-1.0	-8.9
5.6	6.0	8.6	---	---	6.9	7.4	10.7	---	---
5.7	6.2	8.8	---	---	6.9	7.4	10.8	---	---
811.8	792.9	752.8	+18.9	+59.0	242.7	237.5	225.0	+5.2	+17.7

NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS.

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY PLACE OF WORK

689.7	681.6	661.1	+8.1	+28.6	200.9	199.0	193.9	+1.9	+7.0
112.8	111.9	107.3	+0.9	+5.5	27.0	26.8	25.4	+0.2	+1.6
89.3	88.5	84.3	+0.8	+5.0	22.1	21.9	20.6	+0.2	+1.5
3.6	3.5	2.9	+0.1	+0.7					
8.9	8.8	9.6	+0.1	-0.7					
49.6	49.3	47.1	+0.3	+2.5					
27.2	26.9	24.7	+0.3	+2.5					
23.5	23.4	23.0	+0.1	+0.5	4.9	4.9	4.8	+0.0	+0.1
5.1	5.3	6.0	-0.2	-0.9					
2.6	2.5	2.2	+0.1	+0.4					
9.0	8.8	8.6	+0.2	+0.4					
6.8	6.8	6.2	+0.0	+0.6					
0.6	0.6	0.6	+0.0	+0.0	3.4	3.4	3.9	+0.0	-0.5
52.2	52.0	43.4	+0.2	+8.8	15.2	15.1	12.4	+0.1	+2.8
35.9	35.5	35.5	+0.4	+0.4	8.7	8.8	9.0	-0.1	-0.3
15.6	15.2	15.2	+0.4	+0.4	3.8	3.9	3.9	-0.1	-0.1
20.3	20.3	20.3	+0.0	+0.0	4.9	4.9	5.1	+0.0	-0.2
175.5	171.9	172.7	+3.6	+2.8	44.0	43.2	43.6	+0.8	+0.4
41.4	41.2	40.4	+0.2	+1.0	6.2	6.1	5.8	+0.1	+0.4
134.1	130.7	132.3	+3.4	+1.8	37.8	37.1	37.8	+0.7	+0.0
25.1	23.7	25.4	+1.4	-0.3	7.1	6.7	7.5	+0.4	-0.4
21.4	21.1	21.3	+0.3	+0.1	5.3	5.2	5.4	+0.1	-0.1
14.7	14.7	14.7	+0.0	+0.0	4.2	4.3	4.4	-0.1	-0.2
44.0	43.0	43.0	+1.0	+1.0	13.4	13.3	12.9	+0.1	+0.5
28.9	28.2	27.9	+0.7	+1.0	7.8	7.6	7.6	+0.2	+0.2
49.0	48.6	47.9	+0.4	+1.1	9.4	9.4	8.7	+0.0	+0.7
155.4	153.5	147.8	+1.9	+7.6	45.7	44.8	43.6	+0.9	+2.1
14.4	13.9	14.0	+0.5	+0.4	3.7	3.4	3.2	+0.3	+0.5
35.8	35.4	33.2	+0.4	+2.6	6.5	6.3	6.2	+0.2	+0.3
42.2	41.8	40.5	+0.4	+1.7	13.6	13.5	13.5	+0.1	+0.1
63.0	62.4	60.1	+0.6	+2.9	21.9	21.6	20.7	+0.3	+1.2
108.3	107.6	105.9	+0.7	+2.4	47.5	47.5	47.3	+0.0	+0.2

-- Prepared by Labor Market Information, Research and Analysis (CPS-MOD, 1/83)

NONMETROPOLITAN COUNTIES LABOR FORCE AND EMPLOYMENT
November 1983 (Preliminary)

	Apache	Cochise	Coconino	Gila	Graham	Green-lee	La Paz
TOTAL CIVILIAN LABOR FORCE*.	14,900	29,775	36,400	14,650	8,300	3,850	5,300
Total Unemployment	2,100	2,750	3,050	2,625	1,125	275	725
Rate	14.1%	9.2%	8.4%	17.9%	13.6%	7.1%	13.7%
Rate (Seas. Adj.)**. . . .	14.0%	9.2%	8.8%	17.6%	13.7%	6.7%	-INA-
Total Employment	12,800	27,025	33,350	12,025	7,175	3,575	4,575
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS							
TOTAL WAGE AND SALARY. . . .	12,925	21,600	30,700	9,475	4,400	3,025	2,550
Manufacturing.	550	1,600	2,450	1,175	100	350	125
Mining and Quarrying	25	400	50	1,550	75	1,625	0
Construction	1,450	675	1,075	400	175	25	100
Trans., Comm., & Pub. Util..	1,625	1,400	2,250	325	175	50	50
Trade.	1,025	4,175	7,425	1,750	1,325	275	900
Fin., Insur., & Real Estate.	125	525	750	225	125	25	125
Services and Miscellaneous .	3,025	2,700	6,600	1,475	625	75	625
Government	5,100	10,125	10,100	2,575	1,800	600	625

	Mohave	Navajo	Pinal	Santa Cruz	Yavapai	Yuma
TOTAL CIVILIAN LABOR FORCE*.	22,700	24,150	33,100	9,375	32,775	37,000
Total Unemployment	2,950	2,750	4,525	2,300	2,400	5,025
Rate	13.0%	11.4%	13.7%	24.5%	7.3%	13.6%
Rate (Seas. Adj.)**. . . .	13.4%	11.4%	14.1%	22.8%	7.4%	-INA-
Total Employment	19,750	21,400	28,575	7,075	30,375	31,975
THE ABOVE LABOR FORCE STATISTICS SHOULD NOT BE USED FOR ECONOMIC ASSISTANCE PROGRAMS						
TOTAL WAGE AND SALARY. . . .	14,775	16,400	23,675	6,875	17,825	22,375
Manufacturing.	2,250	1,650	2,650	775	1,900	1,650
Mining and Quarrying	275	1,075	5,325	25	1,025	75
Construction	950	625	625	175	1,075	1,725
Trans., Comm., & Pub. Util..	925	1,625	975	525	850	975
Trade.	4,425	3,425	3,625	2,850	4,600	7,175
Fin., Insur., & Real Estate.	600	300	575	250	725	650
Services and Miscellaneous .	2,425	3,575	1,825	900	3,350	3,750
Government	2,925	4,125	8,075	1,375	4,300	6,375

*Adjusted to the Current Population Survey (CPS) to reflect place of residence.
**Seasonal adjustment not applicable for economic assistance programs.

NOTE--Series for Yuma and La Paz counties start January 1983. Data are not comparable to any past series.

ARIZONA LABOR FORCE AND EMPLOYMENT FOR ECONOMIC ASSISTANCE PROGRAMS
October 1983 (Preliminary)

County	Civilian Labor Force	Employment	Unemployment	Rate
Statewide	1,371,781	1,267,045	104,736	7.6%
Apache	14,869	12,613	2,256	15.2
Cochise	30,302	27,537	2,765	9.1
Coconino	36,135	33,257	2,878	8.0
Gila	14,767	12,173	2,594	17.6
Graham	8,399	7,085	1,314	15.6
Greenlee	3,819	3,550	269	7.0
La Paz	5,178	4,458	720	13.9
Maricopa	843,130	792,142	50,988	6.0
Mohave	22,908	19,886	3,022	13.2
Navajo	24,015	21,122	2,893	12.0
Pima	256,449	237,496	18,953	7.4
Pinal	33,035	27,875	5,160	15.6
Santa Cruz	9,505	6,775	2,730	28.7
Yavapai	32,650	30,160	2,490	7.6
Yuma	36,620	30,916	5,704	15.6

Data have been adjusted to the 1972 Standard Industrial Classification (SIC). These figures are the only official BLS labor statistics to be used for revenue sharing purposes. They are not designed to be used as economic indicators. Note: Series for Yuma and La Paz Counties start January 1983. Data are not comparable to any past series.

ESTIMATED HOURS AND EARNINGS OF PRODUCTION WORKERS IN SELECTED INDUSTRIES IN ARIZONA

INDUSTRY	AVERAGE WEEKLY EARNINGS			AVERAGE WEEKLY HOURS			AVG. HOURLY EARNINGS		
	NOV.* 1983	OCT. 1983	NOV. 1982	NOV.* 1983	OCT. 1983	NOV. 1982	NOV.* 1983	OCT. 1983	NOV. 1982
FOR THE STATE OF ARIZONA*									
Manufacturing	373.35	369.74	339.00	41.3	40.9	39.1	9.04	9.04	8.67
Aircraft & Missiles	518.15	494.77	474.18	44.4	42.8	42.0	11.67	11.56	11.29
Food & Kindred Products	321.92	333.48	312.43	39.5	39.7	39.8	8.15	8.40	7.85
Primary Metals	477.56	456.49	453.66	39.5	38.2	37.9	12.09	11.95	11.97
Machinery	346.47	351.78	310.03	41.1	41.0	38.9	8.43	8.58	7.97
Copper Mining	521.43	493.98	513.52	39.0	36.7	39.2	13.37	13.46	13.10
Construction	435.17	458.14	452.36	36.6	37.8	34.4	11.89	12.12	13.15
Utilities	544.36	544.36	492.42	45.1	45.1	43.5	12.07	12.07	11.32
Retail Trade**	216.05	214.09	213.97	33.6	33.4	34.4	6.43	6.41	6.22
Wholesale Trade	355.66	355.66	323.98	40.6	40.6	38.8	8.76	8.76	8.35

* Preliminary
** Excludes eating and drinking places.
NOTE--These estimates are based on a sample of full and part-time production and related employees whose payroll and hours are reported for the pay period which includes the 12th of the month. All data has been adjusted to the 1972 Standard Industrial Classifications (SIC).

--Prepared by Labor Market Information, Research and Analysis (1972 SIC, 1/83)

THE ARIZONA LABOR FORCE IN NOVEMBER 1983

For the eighth consecutive month, Arizona's unemployment rate continued to fall. The statewide rate now stands at 7.2 percent, its lowest level since December 1981, when the unemployment rate was 7.0 percent. Unless the economy suffers serious setbacks in the months ahead, the unemployment rate can be expected to continue its decline into next year. But its rapid descent of the last few months will not continue as the metropolitan areas begin to approach full employment.

During the last twelve months, the construction industry has led the recovery in both absolute and percentage terms. The additional 11,600 jobs, a 17.9 percent increase, is the result of a nearly record number of new housing units being built. Both single family and multi-family housing has risen substantially in the last year. But the pace will likely slow in the coming months as rising vacancy rates and rising housing costs restrict the number of people able to afford housing. This month's loss of 100 jobs was expected and is principally the result of cold winter weather in the rural counties and the completion of some flood repair work.

Manufacturing entered the recovery much later, hitting its low point in February. Since that time, 8,900 jobs have been added for an increase of 6.0 percent. Leading this improvement have been the state's high technology manufacturers and those businesses in the construction-related areas of lumber and aggregates. This too was the pattern of improvement in November. While durable manufacturing remains strong, the nondurables sector lost employment in November. But the loss reflects usual seasonal activity as food processing declines at the end of the chili season.

The other area of continued improvement has been the population serving industries of retail trade and services. Together they account for over 40 percent of all the jobs in the state. Their growth during the recession was severely curtailed as consumers reduced their purchases in response to weakening confidence in the economy. But now the rising tide of the economy in general has helped them to add 6,900 new workers during November. The advances were in nearly every sector, with department stores, restaurants, and lodging places accounting for the bulk of the increase. As has been the case for the last few months, it appears that winter tourism and Christmas business will be very strong this year.

While most of the economic news has been good recently, the state's copper mining industry continues to suffer. Another smelter stopped operations in November and the outlook into next year is not encouraging. While employment in copper mining is holding steady in the 12,600-12,800 range, the price of copper has been falling and inventories have been rising. Even the future price for copper to be delivered in nearly two years is only about 80 cents per pound. With the outlook for little price improvement in the months ahead, many firms may reevaluate their plans for operation in the months ahead.

In general, the recovery of 1983 has been very traditional in many ways. Initially, improvement came in the interest-sensitive industries of construction and automobiles. With the consumer gaining confidence, retail sales began to rise and the recovery continued to gain strength. Now with an apparently strong winter tourism and Christmas season taking shape, we appear poised to enter 1984 in much better shape than many people expected. If the recovery continues to follow the pattern of earlier periods, we can expect business activity to rise as inventories are replenished and new investment in plants and equipment are undertaken. But as has been identified by many people, high deficits will make borrowing money expensive and unless expansion can be financed by internally generated cash, this will have the effect of dampening what would otherwise be a strong recovery.

NEW DEVELOPMENTS

Construction - Construction has begun on Arrowhead Ranch, a $1 billion master-planned community expected to house 51,000 residents. Arrowhead Ranch is a 500 acre tract located in Glendale. Developed by the Paloma Corp., a Richardson, Texas subsidiary of Hunt-Stephens Investments, the project will take 10 years and will include five school and park sites, a convention-resort hotel and a regional shopping center.

The first phase of the $175 million Phoenix Gateway Center has begun. The office, commercial, and hotel complex is being built on the northwest corner of 44th and East Van Buren Streets. Total size is 1.5 million square feet.

Planning for the second phase of the project is also underway. The proposed $150 million development will be built on the northeastern corner of the same intersection and will contain the same mix of buildings that make up the Gateway Center. Total size will be smaller, containing 1 million square feet.

Construction of a multi-million dollar Honda motorcycle dealership owned by Coulter Cadillac begins this month in Chandler. The store is expected to open in July.

The Papago Tribe of Arizona ha established a construction company using the combined resources of the tribal housing program, the Bureau of Indian Affairs, job training funds and a tribal skill center. The company, which had only three employees in April 1982, now employs a total of 105. It is currently building 21 houses, has an $800,000 contract to build a shopping center and a $3.3 million contract for a new school.

The first phase of development has begun on Williams Centre, a $500 million, 110 acre commercial office and retail complex in Tucson. The completed project will contain 2.75 million square feet.

Construction is underway on the new DeVry Institute of Technology complex on the southeast corner of 22nd Avenue and Dunlap. The 120,000 square foot center will accommodate 4,400 students.

An $11.8 million motel and resort-convention center will be built on Yavapai Prescott tribal land. The center is expected to create some 130 full- and part-time jobs, generating a $1 million payroll. The lease agreement guarantees that 30 of the jobs will go to tribal members, providing they are interested and qualified, and that training will be made available. Most of the construction will be financed by industrial revenue bonds. The $1.1 million UDAG funds awarded to the tribe will be loaned to the developer to help defray construction costs.

Construction has begun on the first of two midrise office buildings to be built on Central Avenue in Phoenix. The $42.5 million, 12-story structure is expected to be completed in about one year. The second phase will include a 15-story office building. No construction data has been set for that phase.

Highway Construction - A consortium operated by the Navajo, Hopi and Zuni Indian tribes has been awarded $152,000 in federal job-training funds aimed at helping Indians participate in a four-year, $100 million program for highway improvement and construction in the Four Corners region. U.S. Transportation Secretary Elizabeth Dole said the $152,000 will be used to promote both job-training programs and the development of Indian-owned businesses related to road construction.

Mining - A two-year, $70 million construction program at Inspiration Consolidated Copper Co.'s smelter in Miami will begin this summer with completion scheduled for 1986. Inspiration Consolidated has recently agreed in principle to become a 50 percent partner in the smelter with Amoco Minerals Co. of Englewood, Colorado. Inspiration, based in Phoenix, will retain primary responsibility for operations. The construction program is designed principally to meet Environmental Protection Agency clean-air standards and to increase capacity.

Manufacturing - Liquid Air Corp. has announced plans to build a $14 million air-separation plant in Tucson. The plant, to be completed by 1985, will produce 260 tons of liquid gas a day with capacity to produce more if needed. It will employ 40 persons.

Tucson is currently served by Liquid Air's Phoenix plant which makes 170 tons of gases a day. Since the new plant will be more efficient, the Phoenix plant may be mothballed.

A demonstration plant for researching a method of using clay in the production of aluminum will be built in Tucson by Atlantic Richfield Co. and Aluminum Co. of America. The plant will be used to develop technology for producing aluminum chloride from kaolin clay for use in a smelting process that produces aluminum. The new technology will produce a significant energy savings.

Plans call for construction of a demonstration plant at a cost of more than $10 million in 1986 or 1987. ARCO metals presently has 30 Tucson employees and 15 more permanent research and technical workers will be added.

Retail - Target Stores will hire 1,300 part-time and 200 temporary employees for five stores that it plans to open around the Phoenix area in February. Another 200 management jobs will be created, for a total of 17,000 jobs. Target is the largest division of the Minneapolis-based Dayton Hudson Corp. It operates 205 discount department stores in 22 states.

Apprenticeship Applications - The Arizona Operating Engineers' Apprenticeship and Training System will accept applications for apprenticeships through January. Applicants must be 18 to 30 and have a high school education or its equivalent.

Those interested may call the System's Phoenix office at 252-6138 or the Tucson office at 623-2655.

Legislation Proposed - Arizona employers would get a tax deduction for hiring displaced homemakers under the terms of a bill sponsored by Representative Chris Herstam, R-Phoenix. HB2006 allows an employer to deduct the first three months of salary paid to a displaced homemaker. The bill defines displaced homemaker as someone who was married at least 15 years before a divorce or the death or disability of a spouse. To qualify, those homemakers must not have worked for more than six months at a time during the preceding 10 years. Joann Phalen, director of Arizona Action for Displaced Homemakers, estimates there are more than 100,000 women in the state who fit that description.

Layoff Update - A sharp increase in sales-tax collections is providing Maricopa County with unexpected revenue. According to County Finance Director Ray Smith, the increase and a number of resignations at Maricopa Medical Center mean that further layoffs of county employees may not be necessary to balance the budget by the end of the fiscal year.

Since the October decision by the Board of Supervisors to authorize the layoff of hundreds of employees, only 18 have been laid off, according to county records, while more than 200 hospital employees have resigned.

Closing - Arden-Mayfair Inc. has closed two Food Giant stores in Tucson, affecting about 15 to 20 employees at each store. According to company policy, employees are laid off on a seniority basis and laid-off employees have recall rights for six months. The grocery chain still has nine Tucson stores and has no plans to close any stores outside Tucson.

Closure Update - Yuma's J.M. McDonald store has reopened as Babbitts Department Store. As reported in the November Labor Market Newsletter, some 70 employees had been affected by the fall closure. After the purchase, Babbitts hired approximately 60 persons, most of them previous store employees.

Strike Update - Duval Corp.'s Sierrita Mine is currently operating with a work force of approximately 990, including practically all of about 470 union-represented employees who returned to their jobs without

a contract. Although the unions technically are on strike, no negotiation meetings have been scheduled.

A "cross-training" program has been instituted at Duval's Sierrita Mine. By training workers to perform two or more different jobs, Duval hopes to cut costs.

At Duval's closed Mineral Park molybdenum mine at Kingman, tentative agreement has been negotiated on issues of concern. However, according to company spokesmen, a contract settlement will not change the status of the mine which has been closed since December 15, 1981.

Tentative agreement has been reached on the nationwide Greyhound strike. As of December 15, details of the agreement are incomplete but union sources acknowledge the pact contains major concessions, including a 7.8 percent wage cut - the same amount rejected earlier by more than 90 percent of union members - and a commitment by the employees to assume from the company a 4 percent payment into the pension plan. However, the new agreement does restore a seniority roster for work agreements and other benefits the company sought to eliminate and deletes a clause allowing use of part-time workers.

Some 12,700 drivers, baggage handlers, terminal personnel and mechanics will vote on the proposed contract. Ballots are expected to be counted in Phoenix by December 20th.

Phelps Dodge Strike - The talks between Phelps Dodge and negotiators for the striking unions remain in virtual stalemate. Although the company has agreed to reinstate about 80 to 85 percent of the side agreements canceled July 1, no progress has been made on the main union demands - cost-of-living raises and higher wages for new employees. The chief negotiator for Phelps Dodge has said that according to labor law, "We have to continue to negotiate if they make counterproposals, but there is no real progress."

Despite the stalemate, the coalition of unions to which the strikers belong refuses to believe the situation is hopeless. As reported by the Tucson Citizen, labor officials cite the following reasons for continued optimism:

- A U.S. Supreme Court ruling that some union leaders say means Phelps Dodge will have to fire replacement workers. This is contrary to Phelps Dodge's assertion that because of the court opinion, the company has the legal right to permanently replace strikers.

- Lack of experienced workers among the replacements. The company counters that it has recruited qualified workers for craft jobs and that other production tasks can be learned in a relatively short period.

- Replacement workers may quit either because the work is more drudgery than they anticipated or a further drop in the price of copper may cause Phelps Dodge to lay off its replacement workers. In either case, the outcome theoretically would be the willingness of Phelps Dodge to settle the dispute with the unions.

- New employees and non-strikers need what can be won for them through settlement of the strike.

- Phelps Dodge must eventually give in on the cost-of-living issue. In contract negotiations every three years since 1967, copper unions headed by the United Steelworkers of America have reached an agreement with one company and then have been able to induce other copper producers to accept the same pattern in new contracts. However, Phelps Dodge has given no indication that it is willing to continue this practice.

In the meantime, the talks remain in extended recess. According to a Phelps Dodge official, the earliest that talks will resume is January 10th.

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Arizona Labor Market NEWSLETTER
LABOR MARKET INFORMATION PUBLICATIONS
Site Code 733A
P.O. Box 6123
Phoenix, Arizona 85005